

# **Anti-Fungal Drugs Market - Global Industry Size, Share, Trends, Opportunity, and Forecast, 2018-2028 Segmented By Drug Class (Azoles, Echinocandins, Polyenes, Allylamines, Others), By Indication (Candidiasis, Aspergillosis, Mucormycosis, Dermatophytosis, Others), By Infection Type (Superficial Fungal Infection, Systemic Fungal Infection), By Route of Administration (Topical, Oral, Parenteral, Others), By End User (Homecare, Hospitals, Clinics, Others), By Distribution Channel (Retail Pharmacy, Hospital Pharmacy, Online Pharmacy), By Region and Competition**

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## **Abstracts**

Global Anti-Fungal Drugs Market has valued at USD 13.89 Billion in 2022 and is anticipated to project impressive growth in the forecast period with a CAGR of 4.59% through 2028. Antifungal medications are commonly prescribed to treat fungal infections. These medications can be administered orally, topically, or intravenously via an IV drip. Fungal infections such as yeast infections, ringworm, nail and skin diseases can be caused by fungi present in the soil, air, and skin. Inhaling fungal spores may also lead to respiratory issues. Therefore, individuals with weakened immune systems are more susceptible to fungal infections, necessitating the use of antifungal medication. Most of these medications require a doctor's prescription, although a few are available over the counter.

There are two main categories of antifungal drugs: local and systemic. Depending on the specific condition being treated, local antifungals are commonly applied topically or vaginally, while systemic antifungals are administered orally or intravenously. Examples of systemically administered medicines include itraconazole, fluconazole, ketoconazole, voriconazole, posaconazole, and isavuconazole. Antifungal medications can function in one of two ways: they can directly kill fungal cells or inhibit their growth and development. Moreover, antifungal medications work by targeting structures or functions that are essential in fungal cells but not in human cells, allowing them to combat fungal infections without harming human cells. The fungal cell membrane and cell wall are frequently targeted components, as they surround and protect the fungal cell. Compromising either of these structures can cause the fungal cell to burst open and die.

## Key Market Drivers

### Rising Prevalence of Fungal Infections

The increasing prevalence of fungal infections is a key driver for the revenue growth in the market. Research indicates that fungal pathogens are responsible for approximately 13 million infections and 1.5 million deaths worldwide each year. Antifungal medications are also administered orally. On March 30, 2023, GSK plc and SCYNEXIS, Inc. announced an exclusive license agreement for Brexafemme, a first-in-class antifungal approved by the U.S. Food and Drug Administration (FDA) for the treatment of Vulvovaginal Candidiasis (VVC) and the reduction of the incidence of recurrent VVC (RVVC). This exclusive licensing deal grants GSK the sole right to commercialize Brexafemme for VVC and RVVC while continuing the development of ibrexafungerp, which is currently in phase III clinical trials for the possible treatment of Invasive Candidiasis (IC), a potentially fatal fungal infection.

The prevalence of fungal infections has been on the rise in recent years, prompting concerns within the healthcare industry. Contributing factors to this alarming trend include increasing global temperatures, the prevalence of chronic illnesses, and compromised immune systems. Hospital-acquired fungal infections, or nosocomial infections, have become a significant concern, with approximately 1.7 million hospitalized patients contracting such infections in 2019, according to the Centers for Disease Control and Prevention (CDC).

In response, the global antifungal drugs market is experiencing significant growth, with market players developing advanced treatment methods such as azoles to effectively

combat these infections.

### Increasing Hospitalizations

The increasing number of hospitalizations is a crucial factor contributing to the growing incidence of fungal infections acquired within healthcare settings. This is particularly prevalent among individuals with chronic illnesses such as cancer and those undergoing hematopoietic stem cell transplantation, whose weakened immune systems necessitate frequent hospital visits and extended stays. As these patients often require intensive medical interventions and prolonged periods of hospitalization, they become more susceptible to opportunistic fungal pathogens that thrive in healthcare environments.

It is important to note that these risks are even more pronounced in low and middle-income economies with inadequate healthcare infrastructure. In these settings, limited resources and overcrowding can further exacerbate the spread of nosocomial infections, posing a significant threat to patients' well-being. The lack of proper infection control measures and the absence of effective antifungal treatment options in these regions further compound the challenges faced by healthcare providers.

In light of these challenging conditions, the global antifungal drugs market is expected to flourish as it strives to address and combat these complex healthcare challenges. The development of innovative antifungal therapies and the implementation of comprehensive infection control protocols are paramount to reducing the burden of fungal infections and improving patient outcomes worldwide.

### Increasing Investment for Healthcare Infrastructure

Another significant factor influencing the growth rate of the antifungal drugs market is the rising healthcare expenditure, which not only helps in improving infrastructure but also contributes to the development of advanced treatment options. With increased funding, healthcare facilities can upgrade their capabilities and invest in research and development to discover more effective antifungal medications.

Furthermore, there are rising initiatives by both public and private organizations to spread awareness about the prevalence and severity of myriad fungal infections. These awareness programs aim to educate the general public as well as healthcare professionals about the importance of early diagnosis and appropriate treatment. This concerted effort to enhance knowledge and understanding of fungal infections is

expected to drive the demand for antifungal drugs and expand the market.

Additionally, the market is expected to witness growth due to factors such as high disposable income and the increasing availability of antifungal drugs as over-the-counter (OTC) medications. The ease of access and convenience offered by OTC antifungal drugs is likely to contribute to their widespread use and drive market expansion.

Moreover, the geriatric population is on the rise globally, leading to an increased prevalence of various medical conditions, including fungal infections. As a result, there is a growing demand for antifungal drugs in developing regions to cater to the healthcare needs of the aging population. This demographic shift, coupled with the rising consumption of antifungal drugs for various medical conditions, is expected to further enhance the growth rate of the antifungal drugs market. The combination of rising healthcare expenditure, awareness initiatives, availability of OTC drugs, and the increasing demand from the geriatric population is fueling the growth of the antifungal drugs market.

#### Increasing Number of Antifungal Drugs as Over the counter (OTC)

The increasing availability of antifungal drugs as over the counter (OTC) medications is indeed contributing to the rising demand for these pharmaceuticals. Antifungal drugs are essential for treating a wide range of fungal infections, including athlete's foot, yeast infections, and ringworm. OTC antifungal drugs are readily available at pharmacies, drugstores, and even online marketplaces. Patients can purchase them without needing a prescription, making them more accessible to individuals seeking relief from common fungal infections. The OTC availability empowers individuals to self-diagnose and self-treat common fungal infections. They no longer need to visit a healthcare professional for every minor infection, which not only saves time but also reduces the burden on healthcare systems. As OTC antifungal medications become more prevalent, consumers become increasingly aware of their availability and efficacy. This awareness drives the demand, as individuals are more likely to seek treatment when they know effective remedies are easily accessible. OTC antifungal drugs offer privacy and convenience to consumers. Many people prefer to address fungal infections discreetly without discussing their condition with a healthcare provider. This preference for privacy encourages individuals to purchase these medications independently.

The increasing number of antifungal drugs available as OTC medications is expanding their demand. This shift empowers consumers to take charge of their health and treat

common fungal infections independently, contributing to the overall accessibility and utility of antifungal drugs in managing a range of fungal-related conditions.

## Key Market Challenges

### Adverse Health Effects

There are several disadvantages associated with antifungal drugs. One key factor is that individuals with weakened immune systems, such as those with acquired immunodeficiency syndrome (AIDS), lupus, cancer, and other conditions, are more susceptible to dangerous fungal infections known as opportunistic infections. This vulnerability poses a challenge to the revenue growth of the antifungal drug market.

Furthermore, the type of medicine, dosage strength, and the specific fungus being treated can all influence the outcome of the medication. Common side effects may include pain in the abdomen, unsettled stomach, diarrhea, and itchy, scorching, or rashy skin. These symptoms can also have a negative impact on the revenue growth of the market.

In addition to these challenges, antifungal medication can produce major side effects, including liver damage such as jaundice, anaphylaxis, and other severe allergic responses. Blisters and peeling skin are also symptoms of severe allergic skin reactions that can occur as a result of using antifungal drugs. Considering these factors, it becomes evident that while antifungal drugs are necessary for treating fungal infections, they do come with significant drawbacks that need to be taken into account.

### Increasing Resistance to Antifungal Drugs

The increasing resistance to antifungal drugs is a concerning trend that has the potential to decrease the demand for these medications. Antifungal resistance occurs when fungi develop mechanisms to withstand the effects of antifungal drugs, rendering them less effective or ineffective. Antifungal resistance can complicate the treatment of fungal infections. When antifungal drugs become less effective, patients may require higher doses, prolonged treatment courses, or more potent medications. This can lead to increased healthcare costs and potential side effects, making individuals less inclined to seek treatment. As resistance emerges, it may limit the number of effective antifungal drugs available. This reduction in treatment options can be particularly problematic in cases of severe or drug-resistant fungal infections, potentially reducing the demand for antifungal drugs. The need for alternative antifungal drugs or combination therapies to

combat resistant infections can lead to higher healthcare expenditures. Patients and healthcare providers may be hesitant to invest in expensive treatments, affecting the overall demand for these medications. Antifungal resistance is a public health concern as it can lead to treatment failures, increased mortality rates, and the spread of resistant fungal strains. Such concerns may prompt healthcare systems and organizations to implement stricter control measures, including the restriction of antifungal drug use, which can impact demand.

## Key Market Trends

### Increase In the Number of Research and Development Activities

The increase in the number of research and development (R&D) activities in the field of antifungal drugs is expected to significantly boost the demand for these medications. Antifungal drugs are critical for treating a wide range of fungal infections, from superficial conditions like athlete's foot to life-threatening systemic infections. Increasing R&D investments lead to the discovery of new antifungal compounds and formulations. These innovations are likely to result in the development of more effective drugs with improved mechanisms of action, enhancing the arsenal of treatment options available. R&D efforts are dedicated to understanding and combating antifungal resistance. Researchers are working to identify the mechanisms behind resistance and develop strategies to overcome it. This will ensure the continued effectiveness of antifungal drugs, driving their demand. Research in the field of fungal biology is uncovering specific molecular targets within fungal cells that can be exploited for drug development. Targeted therapies can enhance drug efficacy and reduce side effects, making antifungal drugs more appealing to healthcare providers and patients.

### Technological Progress in Diagnostic Tests and Devices

Technological progress in diagnostic tests and devices is expected to play a crucial role in increasing the demand for antifungal drugs. Technological progress enables the earlier and more precise identification of fungal infections. Rapid diagnostic tests can quickly confirm the presence of fungi, allowing healthcare providers to initiate treatment promptly. This early intervention is critical for preventing the progression of fungal infections, increasing the demand for antifungal drugs. Advanced diagnostic methods can differentiate between various fungal species, helping tailor treatment approaches. Some antifungal drugs are more effective against specific fungi, and accurate species identification ensures the selection of the most appropriate medication, potentially driving the demand for targeted antifungal agents.

Modern diagnostic devices can assess the susceptibility of fungal isolates to different antifungal drugs. This information guides clinicians in choosing the most effective treatment, reducing the likelihood of resistance development and fostering demand for specific antifungal medications.

## Segmental Insights

### Drug Class Insights

In 2022, the Azoles medicine class segment, which includes popular therapeutics such as Noxafil, Diflucan, Vfend, and Cresemba, emerged as the leading market segment for antifungal drugs. This dominance can be attributed to the broad spectrum of activity exhibited by Azoles. By inhibiting fungal enzymes, these substances facilitate fungistatic actions. Azoles are prescribed for the treatment of ocular fungal infections, systemic candidiasis, blastomycosis, and candidemia. Triazoles and imidazoles, two types of azoles, are also utilized for managing systemic fungal infections due to their extensive range of activity and favorable safety profile. Triazoles possess superior absorption and distribution characteristics, fewer side effects, and minimal risk of drug interactions.

The market for antifungal medications is expected to witness slow growth, primarily due to the escalating drug resistance among *Candida* and *Aspergillus* species, particularly against azoles. Conversely, synthetic fungicidal compounds called allylamines are projected to exhibit a steady compound annual growth rate (CAGR) throughout the forecast period. These medications are recommended for the treatment of ringworm, athlete's foot, jock itch, and nail infections. Following fluconazole, Lamisil is the topical antifungal drug most frequently recommended by dermatologists for systemic antifungal therapy. Consequently, the increasing prevalence of dermatological conditions is anticipated to further augment the growth of this segment.

### Indication Insights

The most prevalent systemic fungal infection, candidiasis, is projected to have the highest compound annual growth rate (CAGR) during the forecast period. It is caused by the *Candida* genus and its treatment has evolved over time. Appropriate use of echinocandins and broad-spectrum azoles is recommended for the treatment of mucosal candidiasis, candidemia, and invasive candidiasis, among other changes. The increasing number of individuals susceptible to fungal infections is a significant driver for the market. Furthermore, the growing awareness among patients and healthcare

professionals is expected to contribute to the demand for antifungal medications.

The dermatophytosis category is expected to hold a significant market share throughout the forecast period due to the rising prevalence of skin infections in children. Unhealthy lifestyles have contributed to a significant increase in the prevalence of this infection over the past decade. Immunocompromised patients are particularly concerned due to their susceptibility to severe lesions and atypical symptoms caused by fungi.

Other indications include endocarditis, rhino-cerebral mucormycosis, and invasive pulmonary aspergillosis. One of the main challenges faced by physicians is the limited treatment options available for invasive fungal infections compared to bacterial infections. Only a few therapeutic molecule classes have been developed in the past 30 years. Developing effective therapeutic drugs for managing systemic fungal infections in immunocompromised patients is a key area of interest for industry players. The exploration of innovative therapies through public-private partnerships is expected to offer significant growth potential for the industry.

## Regional Insights

North American market accounted for the largest revenue share in 2022, primarily driven by the increasing prevalence of fungal infections and diseases in the United States and Canada. This region's revenue growth is further supported by rising investments in research and development activities, a higher number of drug approvals, and the presence of well-developed healthcare systems and treatment facilities. Additionally, the market benefits from the strategic initiatives undertaken by major players in the region. For instance, on April 28, 2021, Pfizer Inc. announced the acquisition of Amplyx Pharmaceuticals, Inc., a privately held company focused on developing medicines for debilitating and life-threatening diseases in individuals with weakened immune systems. Amplyx's main chemical, Fosmanogepix (APX001), is a unique experimental asset in development for the treatment of invasive fungal infections.

In Europe, the market is expected to witness significant revenue growth during the forecast period, driven by increasing research and development projects, rising healthcare spending and infrastructure, and the fast-track FDA approvals. Notably, on December 15, 2021, Ibrexafungerp, a novel antifungal agent developed by SCYNEXIS to treat and prevent incurable and drug-resistant infections, received orphan medical product designation from the European Medicines Agency (EMA) for the indication of invasive candidiasis.



## Key Market Players

Abbott Laboratories Inc.

Astellas Pharma Inc.

Bayer AG

GSK plc

Glenmark Pharmaceuticals Limited

Merck & Co. Inc.

Novartis AG

Pfizer Inc.

Mycovia Pharmaceuticals, Inc.

Apex Laboratories Pvt. Ltd.

## Report Scope:

In this report, the Global Anti-Fungal Drugs Market has been segmented into the following categories, in addition to the industry trends which have also been detailed below:

### Anti-Fungal Drugs Market, By Drug Class:

Azoles

Echinocandins

Polyenes

Allylamines

Others

Anti-Fungal Drugs Market, By Indication:

Candidiasis

Aspergillosis

Mucormycosis

Dermatophytosis

Others

Anti-Fungal Drugs Market, By Infection Type:

Superficial Fungal Infection

Systemic Fungal Infection

Anti-Fungal Drugs Market, By Route of Administration:

Topical

Oral

Parenteral

Others

Anti-Fungal Drugs Market, By End User:

Homecare Hospitals

Clinics

Others

Anti-Fungal Drugs Market, By Distribution Channel:

Retail Pharmacy

Hospital Pharmacy

Online Pharmacy

Anti-Fungal Drugs Market, By End User:

Topical

Oral

Parenteral

Others

Anti-Fungal Drugs Market, By Region:

North America

United States

Canada

Mexico

Europe

France

United Kingdom

Italy

Germany

Spain

Asia-Pacific

China

India

Japan

Australia

South Korea

South America

Brazil

Argentina

Colombia

Middle East & Africa

South Africa

Saudi Arabia

UAE

Kuwait

Turkey

Egypt

Competitive Landscape

Company Profiles: Detailed analysis of the major companies present in the Global Anti-Fungal Drugs Market.

### Available Customizations:

Global Anti-Fungal Drugs market report with the given market data, Tech Sci Research offers customizations according to a company's specific needs. The following customization options are available for the report:

#### Company Information

Detailed analysis and profiling of additional market players (up to five).

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